

Appeals Information Management System (AIMS) Portal User Guide

For Clients



DMAS created the AIMS Portal to help you or your authorized representative file a request for an appeal. You can also track the status of your appeal, ask to reschedule a hearing, upload documents, review documents related to your appeal, and withdraw your appeal request.

This guide leads you through how to use the AIMS Portal with clear, illustrated instructions.

Introduction

The Appeals Information Management System, or AIMS, was created to help process client and provider appeals in a timely manner, according to regulations governing Medicaid appeals.

You, the Client (and your authorized representative, if you have one), can sign up for online access to AIMS through this online portal.

With your registered account on the portal, you or your authorized representative can create appeals, track the status of appeals, upload documents, review DMAS appeal documents, withdraw your appeal request, and request to reschedule an appeal hearing.

Even though we encourage you to use AIMS to file and manage your appeals, the DMAS Appeals Division will continue to accept appeals via other channels: mail, email, fax, in person, and over the phone.

Who is a "Client"?



A Client is a person filing an appeal because their application for Medicaid coverage or services was denied, or because Medicaid coverage or services have been reduced or terminated.

This AIMS User Guide for Clients shows you how to use the portal. Click on any of the following topics to go to that section:

- AIMS Account Registration and Login
- Navigating AIMS
- Create and Submit a New Appeal (for Yourself)
- Create and Submit a New Appeal (as an Authorized Representative)
- My Appeals
- Viewing an Appeal
- Withdraw an Appeal or Request to Reschedule a Hearing
- <u>Upload and Download Documents</u>
- Account Maintenance
- Need Support?

AIMS Account Registration and Login

You and/or your authorized representative can register and create an online account. This gives you easy and secure access to the portal. Each person registering must provide their own unique email address and create a password for security.

To register and create your new account, follow these steps.

- Go to the following website address: https://vamedicaid.dmas.virginia.gov/training/appeals. Read about the portal on the screen and note the phone number (804-371-8488) to call if you need help.
- 2. Go to the following website address to register and create an online account: https://appeals-registration.dmas.virginia.gov/client.
- 3. Complete the **First Name**, **Last Name** fields, enter your email address and then confirm it by re-entering it in the **Confirm Email Address** field.
- Below the Confirm Email Address field, read the Attestation Statement. If you agree, <u>check the checkbox</u>.
 Your registration is NOT complete until you check the checkbox.
- 5. Check the I'm not a robot security checkbox.
- 6. Finally, click the **Register** button.
- 7. A message displays that your registration request was received. The system sends notifications to the email address you provided for your new account.
- 8. For security, we send your username and temporary password in separate emails. Change your password when you log in.

Log In

The AIMS portal is a secure web-based system, and safe for you to upload personal health information.

- To log in to AIMS, press and hold the control key and click this URL: https://login.vamedicaid.dmas.virginia.gov/SecureISS/landingpage. The first step is to set your new password. The **Change Password** appears where you can enter your temporary password in the **Current Password** field.
- 2. Next, enter a new password in the **New Password** field.



Your new password must meet these requirements.

Password Requirements

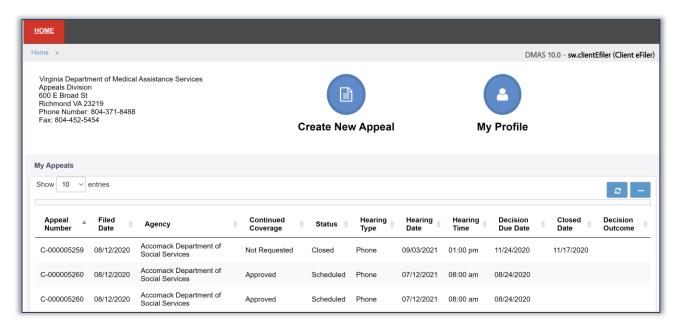
- At least 12 characters' long
- MUST contain at least one uppercase or lowercase letter
- MUST contain at least one number
- MUST NOT contain any of these special characters: " # () { -
- · Cannot match any of the last 24 passwords used
- Click the Set Password button.
- 4. The dashboard displays and you can log into AIMS.
- 5. Enter your username (your email address) in the **Username** field.
- 6. Enter your password in the **Password** field.
- 7. Click the **Sign-In** button.



On the MES dashboard, click the Appeals tile to expand.



9. Click the Appeals Information Management System (AIMS) link.



Create My Profile

After the initial login, AIMS will direct you to the **Client** tab to update your user profile. Your user profile tells the DMAS Appeals Division who you are. If you are filing an appeal for yourself, enter all your information. DMAS uses the information you give us to contact you during the appeal process. If you are an individual or group filing for someone else, enter your information so DMAS will know how to contact you about this appeal. You will add information about the person you are filing for on the **Create New Appeal** form after saving your profile.



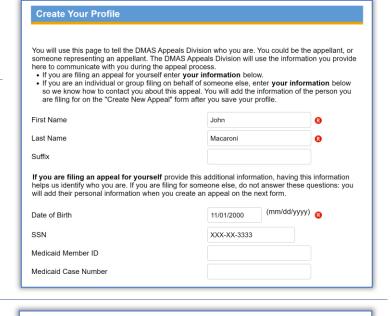
Complete all the required fields and click **Save**. If you move away from this screen, just click the **My Profile** icon on your dashboard.

 In the Create Your Profile section, confirm and complete all fields that you can.

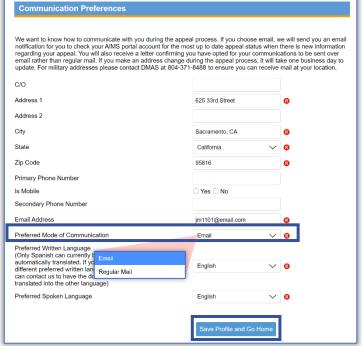


Complete all required fields (18), including First Name, Last Name, and Date of Birth.

Some information may already be listed based on information entered during account registration.



- Under Communication
 Preferences, enter your mailing address and other communication details.
- Use the dropdown arrows next to each field to select your Preferred Mode of Communication (email or regular mail), Preferred Written Language, and Preferred Spoken Language.





Choosing **Email** for communication enables you to receive an email alert anytime a change is made to your appeal file, reminding you to check the most current status of your appeal and any new documents added. If you choose Email for Communication, you will not receive copies of appeal documents through regular U.S. mail.

4. To save the information and return to your dashboard or home screen, click the **Save Profile and Go Home** button.

5. A popup displays two options to select from **Save address as Entered** or **Save as Validated**. Once your selection is made your information is saved and you are returned to your dashboard or home screen.



Navigating AIMS

Use the AIMS portal to submit client appeal requests online. For any appeal you submit, the AIMS portal lets you quickly access and monitor your appeals as they move through the process. AIMS helps you upload documents needed for your appeal. You can also withdraw an appeal and view existing documents on an appeal.



AIMS is a dynamic system, which means as you enter information or make selections in the portal, new fields or options may pop up.

Some fields display a red "R" icon (18) next to the field in the AIMS portal. This icon means it is a required field. You must complete all the required fields before saving or submitting a form or document.

Dashboard and General Navigation

After logging in, your **Home** screen or dashboard displays. Navigation bars and tabs on this screen also appear on screens throughout the AIMS portal, such as the **Home** tab, **Utility** bar, and **System Notifications** bar.



System Notifications Bar

The **System Notifications** bar at the top of your screen shows time sensitive notices about the system. Usually, this notifies you of brief maintenance shut downs.

Utility Bar

The **Utility** bar, located just below the **System Notifications** bar, is available throughout the portal. There are two (2) options on the **Utility** bar.

Sign Out: To log off of the AIMS portal.

Help: Displays a popup where you can search for page-specific help and links to other resources.

□→ Sign Out → Help

Home Tab

The **Home** tab is located just below the **Utility** bar and is always displayed. Just click **Home** to return to your dashboard.

Security Timeout

For security purposes, your AIMS session times out after 15 minutes of inactivity. After 10 minutes of inactivity, a popup message gives you a 5-minute warning.

2. A second popup confirms your session; click **OK** to

If you want to stay logged in, just click **OK**.



Dashboard Icons

continue.

Dashboard icons give you an easy path to either submit a new client appeal or to update your profile when changes are needed.

Create New Click this icon to create and submit a new client appeal

My Profile: Click this icon to update your profile

Create New Appeal

My Profile

Create and Submit a New Appeal (for Yourself)

The first step in the appeals process is to submit an appeal request. To create and submit a new client appeal for yourself, click the **Create New Appeal** icon on your dashboard and complete the following steps.



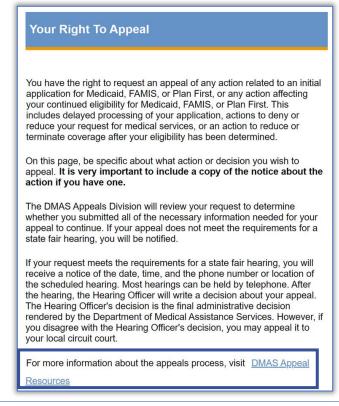
(To file an appeal for someone else, please go to the Create and Submit a New Appeal (as an Authorized Representative), later in this document.)

1. Click the **Create New Appeal** icon.

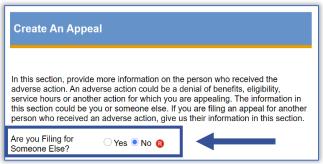


 The first section is information about Your Right To Appeal. Please review this before going to the next section on the screen.

For more information about the appeals process, click the <u>DMAS</u> <u>Appeal Resources</u> link.



3. In the **Create An Appeal** section, select the **No** radio button for *Are you filing for someone else?* You are selecting "**No**" because you are filing for yourself.



In the next section, Continued
 Coverage, select Yes or No to answer the question about continued coverage.

5. If you choose **Yes** for Continued Coverage, enter your **initials** to confirm the request. If you choose No, move to Step 6.



6. In the Appeal Information: What Are You Appealing? section, next to:

Provide the Agency or MCO name that sent the adverse action..., enter the name of the Agency or MCO (Managed Care Organization).

"Adverse action" refers to the denial or termination that you are appealing, which was included in the Notice of Action document you received from an Agency or MCO.





A Managed Care Organization is a health care company that agrees to provide most Medicaid benefits.

 Enter the date on the Notice of Action you received, if known. The Notice of Action is the document that notified you of the adverse action you are appealing.

If you received a Notice of Action, provide the date on the document.

09/01/2020 (mm/dd/yyyy)

8. Enter the date on the *Final MCO*Decision you received, if known. If you

If you received a Final MCO
Decision, provide the date on the document.

[11/30/2020] (mm/dd/yyyy)

are not appealing an MCO action, skip this question.

- In the next text field, explain why you are filing an appeal.
- 10. If you are a community spouse appealing the income or resource determination for your spouse, click the **Yes** radio button.

Otherwise, click No.



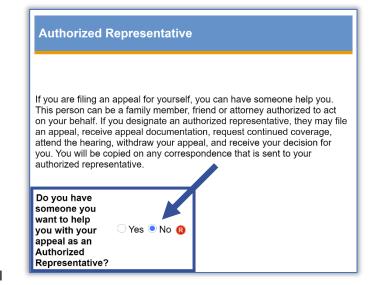
Are you a community spouse appealing the income or resource determination for your spouse?
(A Community Spouse is married to a person applying for or receiving Long Term Care (LTC) Medicaid Services.)



A Community Spouse is an individual married to a person applying for or receiving Long Term Care (LTC) Medicaid Services.

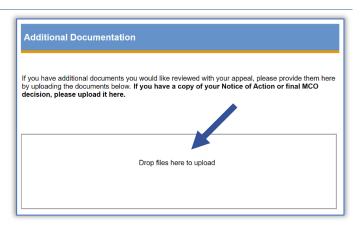
11. In the **Authorized Representative** section, select the **No** radio button if you do not have an Authorized Representative.

If you are planning to represent yourself, choose "No" here. If you would like to assign someone to represent you in the appeal process, choose "Yes," and fill in the Authorized Representative's information in the fields provided. You will still receive copies of all communications related to your appeal, even if you are assisted by an Authorized Representative.

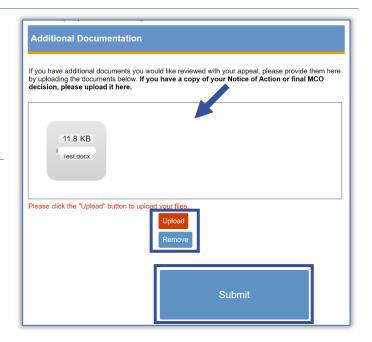


12. Use the **Additional Documentation** section to upload documents supporting your appeal request.

Use a file browser on your computer or device to find the file you want, then drag the document to the "Drop files here to upload" area. Or, click anywhere in the rectangle to open a file browser and find and select a document to upload.



- 13. After adding documents to the upload area, append them to the appeal by clicking the **Upload** button. To start over, you can click **Remove** to clear all documents added before uploading them.
- 14. Once you have completed all sections and required information, click the Submit button.



Create and Submit a New Appeal (as an Authorized Representative)

To create and submit a new client appeal as an authorized representative, click the **Create New Appeal** icon on your dashboard. When creating a new appeal, you can file for someone else as an authorized representative.

We may ask you to submit an additional document with a signature from the appellant telling us you can represent them. You can also submit a Client Authorized Representative Form, available on the DMAS website at http://www.dmas.virginia.gov/#/appealsresources.

1. Click the Create New Appeal icon.

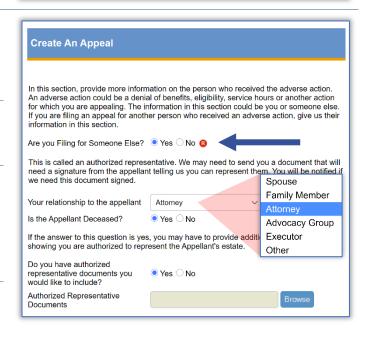


 The first section is information about Your Right To Appeal. Please review this before going to the next section on the screen.

For more information about the appeals process, click the <u>DMAS</u> <u>Appeal Resources</u> link.

Your Right To Appeal You have the right to request an appeal of any action related to an initial application for Medicaid, FAMIS, or Plan First, or any action affecting your continued eligibility for Medicaid, FAMIS, or Plan First. This includes delayed processing of your application, actions to deny or reduce your request for medical services, or an action to reduce or terminate coverage after your eligibility has been determined. On this page, be specific about what action or decision you wish to appeal. It is very important to include a copy of the notice about the action if you have one. The DMAS Appeals Division will review your request to determine whether you submitted all of the necessary information needed for your appeal to continue. If your appeal does not meet the requirements for a state fair hearing, you will be notified. If your request meets the requirements for a state fair hearing, you will receive a notice of the date, time, and the phone number or location of the scheduled hearing. Most hearings can be held by telephone. After the hearing, the Hearing Officer will write a decision about your appeal. The Hearing Officer's decision is the final administrative decision rendered by the Department of Medical Assistance Services. However, if you disagree with the Hearing Officer's decision, you may appeal it to vour local circuit court. For more information about the appeals process, visit DMAS Appeal

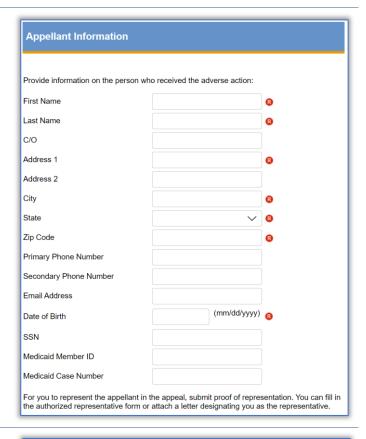
- In the Create An Appeal section, select the Yes radio button for "Are you filing for someone else?"
- After selecting Yes, additional fields and checkboxes display.
- 5. If you select **Yes** to "Is the Appellant Deceased?," you may need to provide additional documents authorizing you to represent the Appellant's estate.
- 6. If you select **Yes** to "Do you have authorized representative



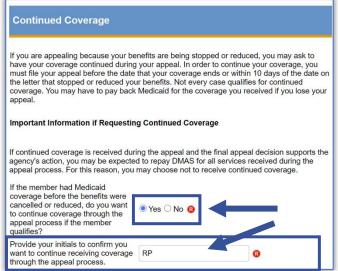
documents...," an additional field lets you upload Authorized Representative Documents.

7. In the **Appellant Information** section provide information about the Appellant. Enter your answer to each item in the text box.

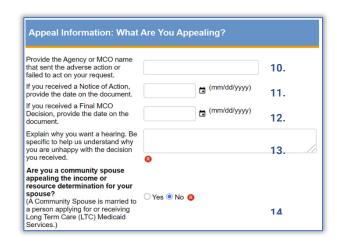
You must complete all required (8) fields, which include First Name, Last Name, Address information, and Date of Birth.



- In the next section, Continued
 Coverage, select Yes or No to answer the question about continued coverage.
- If you choose **Yes** for Continued Coverage, another field pops up for the Authorized Representative to enter their **initials** to confirm the request.



- 10. In the **What Are You Appealing?** section, enter the Agency or MCO Name in the first field.
- 11. Enter the date on the *Notice of Action* you received, if known. The *Notice of Action* is the document that notified you of the decision you are appealing.
- 12. Enter the date on the *Final MCO Decision* you received, if known. If you are not appealing an MCO action, skip this question.



- 13. In the next text field, explain why you are filing an appeal.
- 14. If you are a community spouse appealing the income or resource determination for your spouse, click the **Yes** radio button.Otherwise, click **No**.
- 0

A Community Spouse is an individual married to a person applying for or receiving Long Term Care (LTC) Medicaid Services.

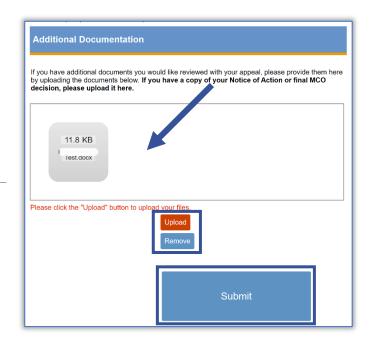
section to upload documents supporting your appeal request.

Use a file browser on your computer or device to find the file you want, then drag the document to the "Drop files here to upload" area. Or, click anywhere in the rectangle to open a file browser and find and select a document to upload.

15. Use the **Additional Documentation**

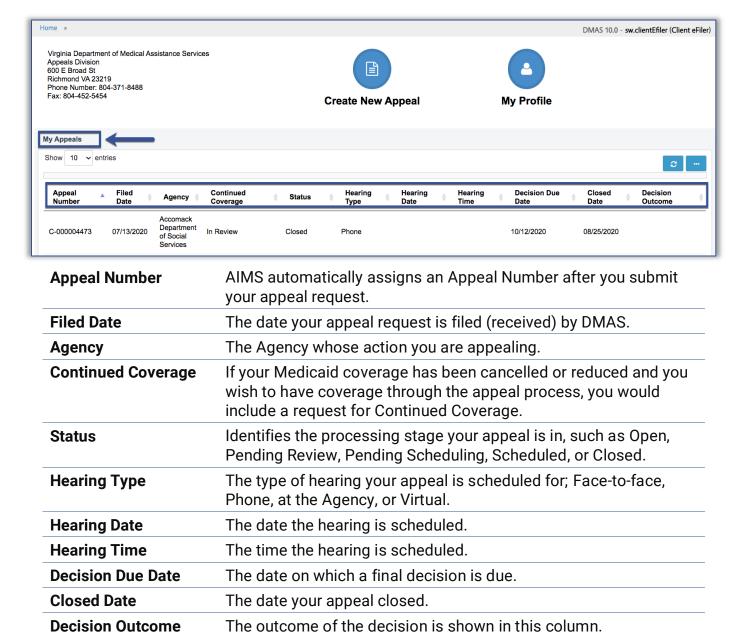


- 16. After adding documents to the upload area, append them to the appeal by clicking the **Upload** button.
 - To start over, you can click **Remove** to clear all documents added before uploading them.
- 17. Once you have completed all sections and required information, click the **Submit** button.



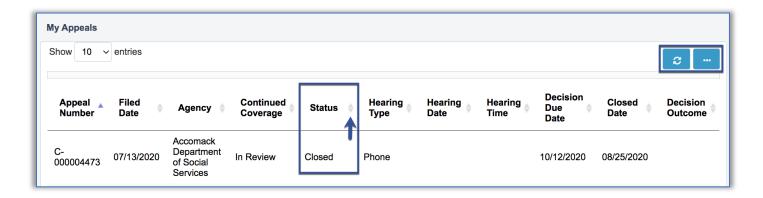
My Appeals

On your Home screen, or dashboard, the section titled **My Appeals** lists all appeals you have filed with DMAS through the AIMS portal. The **My Appeals** queue displays the status of each appeal, for easy tracking. The list includes appeal number, filed date, agency, continued coverage, status, hearing type, date and time, a decision due date, closed date, and final decision.



Sort Your Appeals

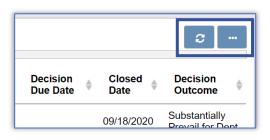
If you have multiple appeals, the AIMS portal makes it easier to find and view them in several ways. For example, you can sort the list by column. To sort on a column, and toggle between ascending or descending, click on the **Column Heading**.



Refresh Your Appeals

The AIMS portal refreshes the *My Appeals* queue automatically, but you can turn the refresh on or off. You may also refresh the queue on demand.

- 1. To refresh the *My Appeals queue*, click the **Refresh** button.
- To turn **OFF** the automatic refresh function, click the **Ellipsis** button.
- 3. Click the **Auto-Refresh** button to toggle between auto-refresh ON or OFF.





Viewing an Appeal

To view an appeal, select the record from **My Appeals** queue on your Home screen. The information you see may vary, based on the status of the appeal. To select a record, click anywhere in that record's row.



The screen refreshes and displays the **Appeal** screen when you select an appeal from the *My Appeals* list. The sections that display on the **Appeal** screen vary based on the appeal status. See the following sections for more information on the **Appeal** screen.

Withdraw an Appeal or Request to Reschedule a Hearing

After you submit an appeal, you can withdraw an open appeal at any time. Once a hearing date and time are scheduled, you may request to reschedule the hearing. To complete either of these actions, you start by selecting the appeal you wish to withdraw or the hearing you are requesting to reschedule from *My Appeals*.

Withdraw Your Appeal

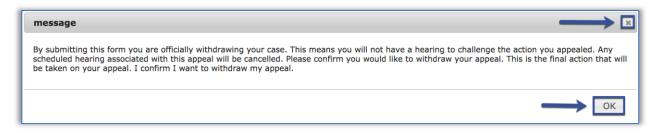
1. From *My Appeals*, select the appeal you want to withdraw. Click anywhere in the record's row to open it.



In the Appeal Actions section, click the Withdraw button.



3. A popup message displays asking you to confirm or cancel the **Withdraw**. To confirm, click the "**OK**" button. To cancel, click the "**X**" in the top right corner of the message and close this popup.



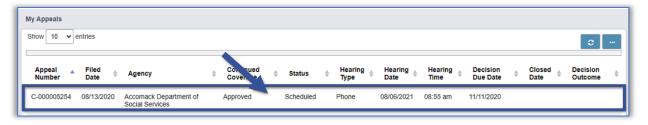
- 4. After you click **OK**, the page refreshes. The **Upload a Document** and **Appeal Actions** sections no longer show on the **Appeals** screen.
 - No further actions can be taken on appeals that are closed. The withdrawn appeal displays in the list with a status of "Closed." A letter will be added to your document list confirming your withdrawal request.
- 5. Return to the dashboard by clicking **Home**.

Reschedule Your Hearing

To reschedule an appeal, it must already be in the status **Scheduled** and have a hearing scheduled in the future. Open the appeal by clicking anywhere in its row.

The section titled **Appeal Actions** shows the **Reschedule** button. Under current regulations, an appeal can only be rescheduled twice absent special reasons.

1. From My Appeals, select the row of the appeal to reschedule.



Click the Reschedule button.



3. Type the **Reschedule Reason** in the text box. This will be reviewed by DMAS staff, so please include a detailed reason for why you are requesting to reschedule your hearing.

Keep in mind that rescheduling a hearing may result in a longer decision deadline for the case.

4. Then click the **Request Reschedule** button.

To cancel the reschedule request, click the **Cancel** button.



Upload and Download Documents

When you open an appeal from the *My Appeals* queue, you can upload, download, or print a document.

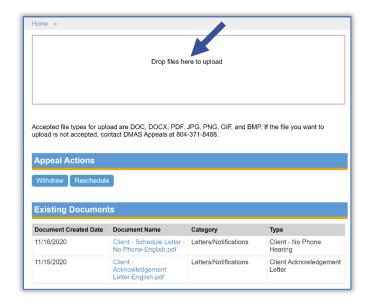
Adding documents to an appeal must follow the regulations and appeal process timeline set by the Hearing Officer. You can print or download documents related to your appeal, such as your Client eFiler Appeal Request. To print documents already associated with your appeal, go to the **Existing Documents** section and open a document to download or print.

Upload Documents

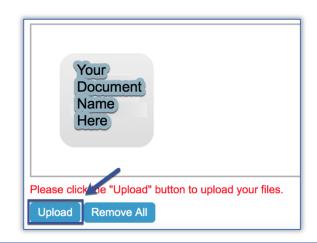
1. To upload documents to your appeal request, use a file browser on your computer or device to find the file you want, then drag the document to the "Drop files here to upload" area.

Or, just click anywhere in the rectangle to open a file browser, then locate and select a document to upload.

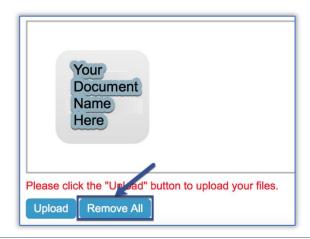
AIMS will capture the file type and the file name after you select the document.



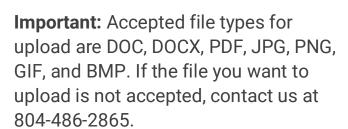
 After your document appears in the upload rectangle, click the **Upload** button attach it to your appeal record.

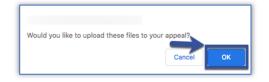


3. If you selected the wrong document to upload, click the **Remove All** button. All uploaded documents are removed, and you can start over selecting the correct documents for upload.



 A popup message to confirm your action displays after clicking **Upload**. Click **OK** to continue uploading the document.





5. The document displays in the **Existing Documents** section once it is uploaded.

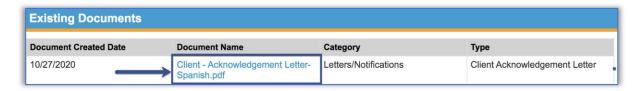


Download Documents

You can download documents already associated with your appeal from this section of the **Appeal** screen. After opening a document, you can save or print it.

In the appeal record, the **Existing Documents** section at the bottom of the screen lists the **Document Created Date**, **Document Name**, **Category**, and **Type** for each document.

 In the Existing Documents section, click the Document Name Link you wish to download.



Depending on the type of file, the document displays on a separate browser tab or in Adobe Acrobat Reader.



Most documents display in PDF file format, which includes text formatting and images. You can download and save the document to your computer and print a copy as needed. To print from the Adobe Reader application, select the printer icon.

Account Maintenance

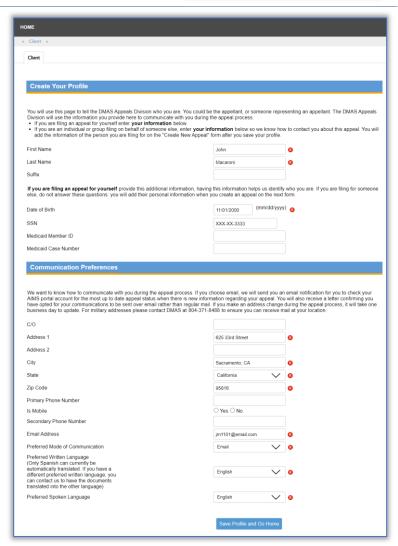
Update My Profile

Follow these steps to update your profile.

1. Select the **My Profile** icon from your dashboard.



- In the Create Your Profile and Communication Preferences sections, update any relevant fields.
- To save the updated information and return to your dashboard or home screen, click the Save Profile and Go Home button.



Need Support?

If you have questions about the AIMS portal or need support, please contact Technical Support at (804) 486-2865.